



COUNTY OF SAN DIEGO

Great Government Through the General Management System – Quality, Timeliness, Value
DEPARTMENT OF HUMAN RESOURCES

CLASS SPECIFICATION

CLASSIFIED

INSURANCE COORDINATOR

Class No. 002344

■ CLASSIFICATION PURPOSE

To plan, organize and develop a comprehensive County insurance program designed to eliminate, reduce, or manage risk involving County property and personnel; and to perform related work as required.

■ DISTINGUISHING CHARACTERISTICS

Insurance Coordinator is a single professional classification allocated only to the Department of Human Resources, Risk Management Division. Under general direction, the incumbent is responsible for evaluating, planning and organizing programs designed to provide cost effective insurance services for the County. This class differs from Senior Human Resources Analyst in that the latter is responsible for developing and administering employee occupational safety and loss prevention safety training programs.

■ FUNCTIONS

The examples of functions listed in the class specification are representative but not necessarily exhaustive or descriptive of any one position in the class. Management is not precluded from assigning other related functions not listed herein if such duties are a logical assignment for the position.

Essential Functions:

1. Compiles and maintains information related to risk exposure in the County.
2. Reviews and evaluates the County's existing insurance coverage to determine adequacy and cost effectiveness and makes recommendations to the Human Resources Services Manager (Risk Management Division) on whether to maintain existing coverage or obtain additional coverage.
3. Researches program budgets, minutes from Board of Supervisors' meetings, and County contracts and agreements to determine whether to obtain or contract out insurance coverage from outside agencies or to self-insure.
4. Interacts with employees of County departments to obtain underwriting information for insurance providers.
5. Acts as liaison between insurance providers and departments on insurance claims.
6. Prepares reports, summaries, and memos documenting study findings and recommendations.
7. Provides administrative support to the Human Resources Services Manager, Risk Management Division, on an as-needed basis.
8. Interacts with employees of County departments when analyzing risk exposure from County contracts and agreements.
9. Provides information pertaining to insurance coverage requirements and limits for County contracts and agreements.
10. Provides responsive, high quality service to County employees, representatives of outside agencies and members of the public by providing accurate, complete and up-to-date information, in a courteous, efficient and timely manner.

■ KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

- State of California insurance law and licensing requirements.
- Insurance contracts, policy, and terminology.
- Methods of real property valuation.
- Methods and techniques used to identify risk and indemnity.

- Government organization and fiscal management, budget administration and preparation methods relative to County government.
- General principles, practices and obligations related to insurance programs.
- Basic computer operation and use including software programs such as spreadsheets, databases, word processing, and electronic mail.
- The County's General Management System in principle and in practice.
- County customer service objectives and strategies.

Skills and Abilities to:

- Research, read, comprehend, interpret, and apply complex legislation, laws, policies and proposals pertaining to insurance.
- Perform detailed reviews on insurance programs, risk programs, proposals, and new or revised legislation and make recommendations designed to maximize coverage and cost savings.
- Communicate effectively when preparing reports, correspondence, and other written documents.
- Communicate effectively in a clear and concise manner when speaking to individuals and groups, interpreting and explaining laws, rules, regulations, data, information, findings, and recommendations to all levels of county employees.
- Develop and deliver training presentations to groups.
- Exercise appropriate judgment in answering questions and releasing information; analyze and project consequences of decisions and/or recommendations.
- Establish effective working relationships with management, employees, employee representatives and the public representing diverse cultures and backgrounds.
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Assess the customer's immediate needs and ensure customer's receipt of needed services through personal service or referral.

■ EDUCATION/EXPERIENCE

Education, training, and/or experience that demonstrate possession of the knowledge, skills and abilities listed above. Examples of qualifying education/experience are:

1. Four (4) years of professional experience working for a public agency, insurance company or insurance broker with responsibility for administering, underwriting, marketing, or negotiating insurance programs, OR
2. Four (4) years of professional underwriting experience, which included property, indemnity, money and securities policies and faithful performance bonds for businesses.

Desirable Qualification: A bachelor's degree in business administration, insurance, accounting, finance, or a closely related field.

■ ESSENTIAL PHYSICAL CHARACTERISTICS

The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of the classification. Reasonable accommodation may be made to enable an individual with qualified disabilities to perform the essential functions of a job, on a case-by-case basis.

Continuous upward and downward flexion of the neck. Frequent: sitting, repetitive use of hands to operate computers, printers, copiers, and telephones. Occasional: walking, standing, bending and twisting of neck, bending and twisting of waist, squatting, using both hands to perform simple grasping and pushing and pulling; reaching above and below shoulder level, and lifting and carrying items weighing up to 10 pounds.

■ SPECIAL NOTES, LICENSES, OR REQUIREMENTS

License

A valid California class C driver's license, which must be maintained throughout employment in this class, is required at time of appointment, or the ability to arrange necessary and timely transportation for travel. Employees in this class may be required to use their own vehicle.

Certification/Registration

Current Certification as a Chartered Property Casualty Underwriter (CPCU) and/or an Associate in Risk Management (ARM) by the Insurance Institute of America is desirable at the time of application.

Working Conditions

The primary work place is an office environment. Work involves frequent exposure to computer screens. Work involves travel to locations within and outside of the county.

Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

Probationary Period

Incumbents appointed to permanent positions in this class shall serve a probationary period of 12 months (Civil Service Rule 4.2.5).

New: July 19, 1979
Reviewed: Spring 2003
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